

**To: Board of Wheatley Housing Group; Wheatley Homes Glasgow; Wheatley Homes East; Wheatley Homes South and Loretto Housing**

**By: Group Scrutiny Panel (with support from Lesley Baird TPAS Associate)**

## ***Repairs Communication - Thematic Review***

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### **1. Introduction**

The Wheatley Group Scrutiny Panel (“the Panel”) independently reviews and scrutinises the performance of the four registered social landlords that make up Wheatley Group (“the Group”). This covers: Wheatley Homes Glasgow, Wheatley Homes South, Wheatley Homes East and Loretto Housing. The Panel plays an important role and ensures that customers are involved in scrutiny and can help the Group to deliver enhanced services through influencing and co-designing improvements. In 2023, to enhance the Group scrutiny approach the Panel was expanded to include over 30 customers representing each of the Group’s four social landlords.

Under our Terms of Reference, in addition to scrutinising the Group’s performance the Panel can take a deeper dive into areas by undertaking thematic reviews of specific Group services and policies, and where appropriate, make recommendations for how they can be improved for customers.

For the first thematic review of the expanded Panel, repairs was chosen by the Panel as a key service impacting customer satisfaction. Members of the Panel volunteered to undertake the thematic and decided specifically that repairs communication should be the topic under review. This report sets out the background, findings and recommendations of the repairs communication thematic scrutiny group (“thematic group”). The thematic group was independently supported by TPAS to undertake the review.

Thank you to the participants in the thematic group and also those members of Wheatley Group and City Building (Glasgow) (“CBG”) staff that contributed to this review – the thematic exercise exemplified collaborative working with colleagues and customers to identify areas of improvement in terms of repairs communication for the benefit of both customers and employees.

## 2. Brief and background

The expanded Group Scrutiny Panel is now operational and meets quarterly to scrutinise Wheatley Group performance. The Panel agreed on topics for more in-depth scrutiny, with repairs being selected as the first service area for thematic review. This was felt to be particularly relevant following recent improvements made to the repairs services, such as the continued roll-out of *Book it, Track it, Rate it* to improve communication with customers.

Members of the Panel interested then volunteered to take part in the thematic scrutiny review, with representation from each of the Group's social landlords. The thematic group was briefed to:

- (1) determine an area of repairs for thematic review;
- (2) determine an approach towards the review including any information requirements;
- (3) undertake fieldwork to identify areas of improvement including through analysing information and meeting with staff; and
- (4) work with TPAS to develop a report detailing findings and recommendations

The thematic review group members included–

- *Wheatley Homes Glasgow* (WHG) – Chris Quinn, Gerry McAdam, Rhona Paterson, Frances Monaghan (factored owner), Margaret McMillan, Mark Cairney, Douglas Wilson (factored owner)
- *Wheatley Homes East* (WHE) – David Turnbull, Louise Stewart, Andrew Hack
- *Wheatley Homes South* (WHS)– Mary Muir, Elaine Taylor, Dianne Currie, Colin Scope – Handley
- *Loretto Housing* – Graham McInnes

The thematic group is independently facilitated by Lesley Baird, TPAS Scotland Associate and supported by Morgan English, Wheatley Group Governance Projects and Policy Lead. Throughout the review, meeting notes and action lists were maintained by Morgan English and circulated with the thematic group and internally.

### 3. Methodology and information requested, with details of additional sessions

As a large service area with many different strands, the thematic group firstly met with service leads in July 2023 for a review planning session in Wheatley House, Glasgow. Following a presentation on repairs performance and the recent/planned improvement activity, the thematic group discussed the repair thematic options and agreed that repairs communications would be the focus of the review. The group then considered and requested the initial information required being:

- A flow/process map of the whole repairs journey highlight in particular the points when customers expect to receive communication;
- National standards and good practice including from Scottish Government and the Scottish Housing Regulator;
- Customer insight, including from complaints regarding repairs communication; and
- A visit to the Customer First Centre (“CFC”) to go through the repairs reporting process, ask questions and if possible hear a repairs call (subject to GDPR)

Throughout the review, the thematic group took into account the different contexts and repairs service delivery throughout the geographies of the Group partners and the different stages of improvement activity underway, such as the launch of the *Book it, Rate it Track it*. It was noted that recommendations identified by the thematic group would be useful to inform further improvement activity as this rolls out.

Meetings held were a mix of in-person and hybrid/virtual to allow the thematic group to participate in a way that suited them. Following the initial planning session, the thematic group received the following to consider ahead of visiting the CFC:

- Repairs journey flowchart and an end-to-end customer journey map for West, South and East Repair subsidiaries for Routine Appointed Repairs highlighting communication touch points across Face to Face/Digital/CFC Channels;
- Example screenshots of repairs communications on website and web self service (“WSS”);
- Customer insight via a sample of Stage 1 and 2 complaints case studies and compliments received in July from across Group. These were selected from complaints relating to repairs communication which were reviewed by Executive Team in August;
- Scottish Housing Regulator 2018 repairs thematic - <https://www.housingregulator.gov.scot/media/1084/thematic-repairs-services-in-scotland-february-2018.pdf> ;
- Scottish Social Housing Charter – information on repairs communications The Scottish Social Housing Charter ([www.gov.scot](http://www.gov.scot))

In August the thematic group met in Lipton House, Glasgow to discuss with TPAS the information received. The thematic group also had a tour of the CFC and the opportunity to ask questions and have a roundtable discussion with staff. The group received redacted repairs call transcripts and CFC, repairs and digital innovation leads presented to the group covering:

- customer satisfaction results over last 6 months (taken from the WalkMe real-time feedback survey data at the point a customer successfully raises and books a repair) and general points on what we are actively working on to improve;
- a short demo of Web Self Service -reporting and booking a new repair online process video; and
- ThinkYes Together repairs journey example video – highlighting a good practice standard which is shown in staff sessions, collaborative working between Wheatley Group and City Building (Glasgow)

Following the visit, the thematic group took time to consider all the information received and discussed the visit at a follow-up meeting with TPAS later that month. Prior to this meeting, the group received the recently refreshed Wheatley Group repairs and maintenance framework policy. The group discussed this as well as findings/progress so far and next steps. It was agreed that the group would receive information regarding:

- CFC and trade operative training and speak to CFC advisor and trade operative;
- what a new tenant receives in terms of repairs information

Prior to the meeting in September, the thematic group received repairs Customer Service Excellence training slides and meetings notes; CFC induction material related to repairs; example MyRepairs leaflets given to customers on sign-up; example SST tenancy agreement which details repairs information; and a recent example newsletter detailing repairs information for customers.

In September, the thematic group then met with the Director of Group Repairs, Investment and Compliance, a CBG plumber and a CFC advisor and asked staff questions regarding their training, what was working well and not so well. Following this, it was agreed a similar survey would be sent out to all CFC and repairs staff to collate their feedback on an anonymous basis.

Following this, the thematic group met with TPAS in October to discuss the draft report detailing all work progressed and findings, to thereafter agree the report and its findings. It was noted that the report would be presented to Boards, and the recommendations discussed with the thematic group and Wheatley Group staff to co-create a response to action these.

Throughout the review, the thematic group had full access to Group staff, many of whom attended a group meeting at the request of the group for example: Danny Lowe (Director of Group Repairs, Investment and Compliance), Joe Lambie (Housing and Commercial Specialist Director), Lillian Baikie (MyRepairs Manager), Peter Smith (Director of Repairs Projects), Louise Wilson (CFC Operations Manager), Fiona Woods (Digital Innovation Lead), Mairi Keddie (Business Improvement Lead), Conor Lanigan (Stronger Voices Manager), Stephen Wright (Director of Governance), Elizabeth Cuthbertson (Strategy and Performance Lead), Lorna McCubbin (Head of Asset Investment and Compliance) and Ian Dickson (Head of Repairs, WHE)

Overall, the thematic group commented that they were pleased with the information provided and the free access to staff at all levels. The group agreed that they were impressed with the openness and willingness from all staff to engage and provide information, which supported the review process, All group meetings were collaborative and engaging.

#### 4. Findings

The group worked hard to scrutinise the information and the processes in terms of communication. The thematic area of repairs communication was chosen by the group as being of key importance to the success, or not, of a repair and can have a major impact on tenants satisfaction with a repair. The key focus of the group was to understand how the repairs systems and processes relating to communications work and to identify any gaps, barriers and areas for improvement.

The thematic group welcomed that in the short time since the launch of *Book it, Track it, Rate it* in the West and East, the Group was already seeing positive results in terms of satisfaction. It was noted that this was also being seen through Web Self Service satisfaction results.

The thematic group noted that all staff in CFC and repairs operatives are offered additional training as required and their views were actively sought to help the continual improvement of services. The group was also happy that alongside digital options there are various other methods for tenants to report a repair.

The group acknowledged due to work underway such as improvements in partnership working, for example the introduction of the MyRepairs team in the CFC and closer working with CBG and Wheatley Group, that the repairs service is continually improving.

It was noted therefore that some of the group’s suggestions to improve services were included within plans already however the thematic’ s findings would contribute to these. For example, allowing customers to cancel their repair up to 24 hours before the repair appointment through Web Self Service, and as part the improvements to *Book it, Track it, Rate it* there will be 2-way communication to allow customers to cancel a tradesperson who is on their way.

The thematic group felt it was important that alongside the information requested and received, it was vital to dig deeper into the information by speaking to employees connected to repairs communications at all levels through an anonymous survey. The group was pleased with the response rate of this and thanked the staff who took the time to respond. The group appreciated the openness and honesty of all Wheatley Group staff and with quality of repairs information delivered. The group was satisfied that training for CFC and operatives is fit for purpose and customer focussed. From the staff survey that was circulated on behalf of the group, findings were as follows:

*CFC survey – 27 responses*

Questions	Findings
In terms of repairs communication, what works well in your role	<ul style="list-style-type: none"> <li>-Over 20% commented on regular team updates/communication and meetings</li> <li>-Nearly 30% mentioned closer working with CBG, including face-to-face with MyRepairs team at Darnick St meaning quick response from operations team</li> <li>-Around 20% commented on having MyRepairs team as point of contact for complex repairs</li> </ul>
Is there anything you would change to help improve repair communications for our customers?	<ul style="list-style-type: none"> <li>-Around 15% felt further development and roll out of Book it, Track it, Rate it across all repairs</li> <li>-About 44% felt more communication to customers from planners and operations (or sub contractor) e.g. for appointment or job changes after CFC has booked in</li> <li>-30 day lines being booked in that don’t automatically go to inspection and customer being clear when a job is being inspected rather than thinking a trade is due to attend</li> </ul>

Is there any additional training you think should be considered to improve repairs communication for customers?	-38% answered no -those who answered yes suggested basic courses in trades for repair advisors and further training on CBG processes/when sub contractor required, and further roll out of CSE training
Thinking of repairs, are there opportunities to expand/refresh your training?	-67% said yes there are opportunities to expand including through ThinkYes sessions i.e. Damp and mould process -85% said received training on customer service and repairs
Are you able to take ownership of a customer's repairs issue?	-81% said yes -communication with City Building raised as blockage sometimes i.e. email by 5 respondents

*Trade survey – 41 responses*

Questions	Findings
In terms of repairs communication, what works well in your role	-52% commented on good communication from team including team leader, planners etc i.e. through calls/email/MS teams chat and with customers -10% mentioned mobile devices having all information including notes from past comms/progress of works -13% said having all required and accurate info i.e. job description and requirements, customer contact
Is there anything you would change to help improve repair communications?	-Approx one third suggested more comms and understanding of repairs from office staff i.e. trades invited to weekly team meetings -38% said more detailed and accurate notes inc. instructions/job descriptions i.e. pictures
If applicable, what do you think of Book it, Track it, Rate it (Localz) being rolled out?	-22% feel a step in the right direction and good idea in theory – further roll out required - Around 10% concern about privacy i.e. home address
Thinking of repairs, are there opportunities to expand/refresh your training?	-53% said completing job right first time -also health and safety; repairing to good standard; good service and satisfaction with customer

<p>What are your thoughts on the Customer First Centre? Are the details you get from the CFC accurate?</p>	<p>-64% said details could be more accurate          -acknowledgment this can depend on information from customer          -suggestions to increase repairs and maintenance trade knowledge to correctly diagnose and obtain all required information</p>
<p>If due to inaccurate details you are sent to a job that is not your trade or do not have the correct materials, what steps would you take?</p>	<p>-All respondents answered largely the same: explain to customer, contact team leader and schedulers to rectify and obtain correct materials/ raise a line for correct trade to attend</p>
<p>In terms of repairs and customer service excellence, what do you think of your training? Are there any gaps?</p>	<p>-68% praised training and felt there were no gaps          -others highlighted they required further training and this needed to be promoted further, for example training sessions with CFC, with a few commenting preference for in-person</p>

Following the thematic fieldwork, the group wished to thank Morgan English for all her hard work and support to the group.

## 5. Recommendations

### The group repairs and maintenance policy specific recommendations -

1. 5.2.1 *“Customers can report repairs by phone through our Customer First Centre; online through self-service online customer accounts, by post: or in person through contacting any of our frontline service delivery teams working in communities”* should be updated to include Book it, track it, rate it.
2. 5.2.2 *“We will accept repair requests from customers, residents, members of their household and other individuals supporting them and authorised to act on their behalf”*. Clarity needed here on what level of authority is required, a simple letter or mandate form to be filled in and flagged in customer file. Customer should only need to authorise this once and should remain on profile for all relevant parties to view.



3. 5.3.3 *“Where we attend to carry out a repair and cannot gain access, we will leave a card giving contact details and ask the customer to make contact to re-arrange access”*. The operative could send the tenant a photo of e.g. the front door to prove they had attended, in addition they could phone the tenant where there is no access, it could be that they just take a while to get to the door
4. 5.4.4 *“Repairs reported out with normal working hours will be attended to out with normal working hours only when there is a serious risk to the customer’s health and safety or there is a serious risk to the structure of the property or where the property is not secure”*. It should be made clear to tenants if they insist on a job being done out of hours and it is a non-emergency repair, the policy is to recharge the tenant in these circumstances.
5. 5.4.7 *“We will keep our customers informed of the progress of the work throughout the process”*. Add in the process of what methods will be used to keep customers informed, even if there is no update. The system should flag days since a customer raised a repair and what if any contact was made, if no contact was made the customer should be contacted.
6. 5.6.1 *“In order to enhance the quality of life for our customers who may have a disability and live in our properties for social rent, our social landlords will support and assist in the execution of works which will enable independent living, where it is both appropriate and technically viable to do so”*. add that an occupational therapist must recommend the adaptation.
7. 7.2.5 itemise the methods will be used to report customer satisfaction.

### **Other recommendations**

8. Tenants who do not sign up for *Book it Track it Rate it* should be supported to sign up, if this is not an appropriate method assurance should be given that there are other methods available for example for those not mobile connected.

9. Although not system experts, the group recognise the importance of ASTRA and Servitor as key pillars of effective repairs communication. Within the customer journey mapping and repairs process, the systems Astra (platform for Wheatley frontline customer teams to raise repairs and view open/historical repairs) and Servitor (repair management platform for delivery of repair) should be used to their full capability and harmonised further to ensure that they “speak to each other” and avoid human error and time/efficiency wasted through emailing. This would improve other points raised to ensure trade operatives have all the information needed from the CFC regarding a job (meaning they can collect correct materials to attend the job) and any pertinent details regarding the customer (e.g. accessibility considerations). This would improve issues such as some raised from the staff surveys:
- When a customer reports a repair, every effort should be made to collect as much information as possible, asking the correct questions to diagnose – this may include following a script. All of this detail should be available to the trade operative, and may even include photos
  - Operatives being frustrated with a recent change to their job process; before visiting the stores to collect any material required, they must visit the tenant first, this was noted as creating dissatisfaction for tenants. In relation to jobs requiring the attendance of more than one trade operative, the follow-on operatives should have all, and as detailed as possible, information on the job that they need in order to collect the right material for the job before going to the job
10. Repairs teams in West, East and South should work closely, to share good practice and learning.
11. The system should flag to an operative that for example the tenant can take a while to answer the door, that they have a sensory impairment, they are not available during school run times, or if English is not their first language or other similar issue. All relevant staff should have access to this information.
12. The process to registering with Web Self Service is complicated and difficult, customers are asked to provide information they may no longer have such as their number, the process should be simplified.
13. Additional training should be offered to CFC and operatives to allow them to understand and deal with people with hidden disabilities, for example, mental health, but that tenants are not obliged to declare this information to Wheatley Group.

- 14.** CFC staff noted frustration when a there is no access following customer missed appointment this job has to be closed and re- raised, if the job requires an inspector, they have to revisit the job, and the 30 day timeframe starts over again, the information about the job should be on the system so that an inspector does not have to call again.
- 15.** The scheduling and planning process could be more efficient for example, planners contact customers directly before booking in and if there is any change to their job. Where there are a number of repairs they should be “bundled together” by planners to be completed within the 30 day timescale and cause minimum disruption to the customer.
- 16.** Prior to work commencing, factored owners, who pay for repairs, should be informed of the initial cost of the repair and any possible additional costs, for example if there is follow up work required or if the customer is unsatisfied with job first time.
- 17.** In terms of communal repairs, there should be a clear point of contact to ensure all customers are kept informed. Also, consideration of role of staff in raising communal repairs where customers may not realise they require to raise this individually.
- 18.** Clear routes for staff should be available to feedback to senior staff to ensure continuous improvement of services.

The Board are asked to note the report and its recommendations and note that a response to the recommendations will be co-created with the thematic group and Wheatley Group staff.